



Julie K Wiedner CPA, PC

Business Client Tax Organizer

Please complete this Organizer before your appointment

TAX YEAR BEING FILED: _____

Company Information

Company Information form with fields for Legal Name, DBA Name, Address, Phone, Fax, FEIN (SS-4), email, website, Texas Secretary of State ID, Texas Comptroller's Tax ID, Date of Incorporation/Organization, Date of S-Corp Election, and State of Incorporation/Organization.

Directors and Officers table with columns for Name, Address, and SSN. Rows include Directors: Manager and Officers: President, Vice President, Secretary, Treasurer, and Partners: General, Limited.

Stock table with columns: Type, Amt authorized, Amt Issued, Amt Outstanding, Par Value. Rows include Common, Preferred, and Treasury.

Items to Provide for your appointment: (We may have additional item request after review of Client data)

- Checklist of items to provide for appointment, including tax returns, balance reconciliations, formation documents, and insurance information.

To the best of my knowledge, the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Signature: _____ Date: _____

Title: _____